IS YOUR TONGUE ON THE FROZEN FLAGPOLE?

What do you think of when you hear the word "workflow"? For some people this triggers thoughts of endless flowcharts or it conjures up images of tasks and notifications managed (or mismanaged) by a software solution. For others, this is just another "buzzword" that represents something they should be doing to help improve quality and efficiency, but have yet to implement. And of course, let us not forget the naysayers who poo-poo the concept of formalized workflows out of fear of change, anxiety over additional workload or loss of responsibility, or a lack of faith based on previous failures. The truth is, a workflow can be either – a documented process, supported by technology, providing consistent results, enhancing the business or it can be a failure ranging from mediocre to abysmal. Most organizations have a mixed bag, all organizations have room for improvement.

First, let's get on the same page about what a workflow is. According to Business Dictionary the formal definition of a workflow is a "Progression of steps (tasks, events, interactions) that comprise a work process, involve two or more persons, and create or add value to the organization's activities. In a sequential workflow, each step is dependent on occurrence of the previous step; in a parallel workflow, two or more steps can occur concurrently." Or in laymen's terms "the way we do things to get stuff done." I find the second definition to be more to the point.

Second, let's get the "why" out of the way. Why bother with the investment it takes to design, document, support, and implement a structured process? Ah this one is easy – a good workflow results in great return on investment which can be measured and quantified in a few weeks' time. This has a positive impact on the bottom line and on staff satisfaction and retention. Or again in laymen's terms "because this stuff makes people happy and saves money." Side note – if you don't like money, feel free to send me yours.

So what do you need to know about workflows? You need to know what it takes to succeed, the importance of regular evaluations, and the pitfalls and risks of formalized workflows.

Keys to Success

- Leadership Support
  - This one should go without saying, and yet many poorly executed processes are rooted in the lack of leadership support. If a staff member observes her manager ignoring tasks or deviating from processes she is more likely to repeat the same behaviors. The long term result is a slow, yet exponential, deterioration of both respect and execution of business processes.
  - Leadership support must require accurate data input and full participation from all staff levels. Poorly maintained data or lack of staff participation will result in ineffective or abandoned workflows.
- Workflow Process Resource
  - For a larger organization this may include an individual or a team dedicated to process improvement through workflow design and analysis. For small to mid-sized organizations or large

organizations seeking an independent resource, retaining a business solutions consultant is appropriate. In either situation it is key for the resource to be knowledgeable in process improvement, related technologies, training, documentation, conflict resolution, and of course – an in-depth knowledge of your industry.

- Consistent Methodology
    - Using a consistent method for review, design, implementation, documentation, training, and cost/benefit calculations makes the experience familiar and repeatable from process to process. This will also prevent "skipping steps" in the workflow design. Quality and consistency are the two primary objectives of a workflow.
    - Using a consistent methodology will also allow the workflow team to "lead by example."
- Consistent Evaluation
    - Once a workflow is designed it can be tempting to "set it and forget it". However, both to address the requirements of ever evolving industries and to always be working on a path of continuous improvement, performing evaluations of existing workflows is key to ongoing success.
- Employee Involvement
    - It is imperative to communicate to employee's how the workflows benefit to the staff and not just the organization. For example, a workflow may reduce an employee's involvement in a specific task, resulting in time for more challenging tasks.
    - Involvement = empowerment. Employees who feel empowered are more productive and contribute more to the organization.
    - Employees provide essential knowledge during all phases of workflow development.

Evaluations

Before a formal workflow has been developed you'll need to pull together those involved, document their current process, identify areas of waste and risk, design, document, and implement a leaner, cleaner workflow. Once a workflow is developed and implemented the process should be evaluated at regular intervals. The frequency with which you do this will depend upon:

- Workflow criticality
    - A workflow that impacts critical business functions, such as invoice processing, should be assessed more frequently to ensure efficient performance, maximum consistency, and accurate output. Critical workflows should be evaluated annually at a minimum.
- Changes to upstream processes
    - When workflow input is modified the process should be reviewed to identify if output will remain consistent and if changes should be introduced to improve efficiency.
- Changes to downstream processes
    - Whenever the requirement of the workflow output is modified the workflow should be evaluated to ensure the new output requirements will be met, and met consistently, with the most efficiency.

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- Technology changes
    - Technology changes that impact the business process, including non-operations software such as a new HRIS or payroll system, require significant review of related workflows, which may result in a significant rewrite to the processes.
    - Technology changes in project management or workflow management systems initiate a requirement to review a workflow process to ensure the software does not cause a decrease in efficiency or require a change to the business processes.
- Inconsistent Output
    - When the workflow output is not consistent the process needs to be evaluated and the weakness identified and addressed. When this occurs it typically indicates a poorly designed workflow, untrained staff, or an environmental change, such as the ones mentioned above.
- Unplanned consequences
    - Sometimes changes can have unplanned consequences, such as generating a negative impact towards an organization's "Go Green Initiative." Whenever an unplanned negative consequence arises as the result of a workflow the workflow should be analyzed for modification.
- Staff feedback
    - If staff consistently provides negative feedback about the workflow or negative feedback about the workflow output, the process should be reviewed. Key players in a process will often identify a shortcoming in a process long before reports and analysis capture the impacts. Additionally, negative staff feedback can indicate that portions of the workflow may be distasteful to the staff or the staff members are not prepared to change. Staff retention is key in a successful organization, therefore it may appropriate to provide additional training and/or modify the process to create a more positive experience for those involved.

Common Pitfalls and Risks

Nothing comes without a risk. Workflows are no different. Keep your eye on the prize, but watch out that you don't find yourself creating **Banes of Existence** instead of **Keys to Success**.

- Micromanagement
    - Do not fall into the trap of monitoring every last detail. This can quickly become both a time drain and undermine staff morale. Do not allow this to become the "red tape" of your organization.
- Allow for Exceptions
    - Every process is going to encounter a scenario that requires an exception. Make sure you allow for these situations to occur. If a process is so rigid that it becomes unusable the team will find a way to deviate and the related processes will be negatively impacted.
- Not addressing employee concerns
    - Staff is a critical, critical, critical asset. Introducing structured workflows may cause employees to be concerned that changing processes will reduce their contribution to the organization or remove their position entirely. Additionally, a workflow may remove the need for decision making by staff, resulting in a feeling of loss of control. Lastly, the staff may feel as though they

are constantly being monitored. Not addressing these concerns can result in decreased morale, decreased performance, and turnover.

- Purchasing the Yugo or the Lamborghini of Workflow Software Solutions
  - With the assistance of an experienced process improvement specialist determine your needs and shop from there.
  - Do not buy the cheapest package because it is cheap. You don't get what you don't pay for. Also, don't go straight to the most expensive, robust model, and don't buy features you won't leverage.
  - Identify a solution that meets your needs, is scalable, flexible, supportable, integrates well with your existing technology environment, and is appropriate for your budget.
  - Closely evaluate the software packages you currently possess. Many processes can be created to work within your existing solutions.
- Don't go it alone
  - What can we say? Just don't do it. Don't put your hand on a hot stove, don't put your tongue on a frozen flag pole (even on a double dog dare), and don't try and implement formalized workflow solutions without guidance.
  - Once you have a consistent methodology, an internal resource, supporting technologies, and regular staff buy in, you can fly solo. Until then – keep your hands in your pockets, your tongue in your mouth, and have a successful experience.

Now that you know the workflow basics, essentials to success, and common perils, stop hesitating and start leveraging formally developed workflows as part of your continuous improvement initiatives.

We can help! Contact Us today:

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